PHYSICAL ENGAGEMENT INDEX

Annual Benchmark

2026

The measure of physical engagement.

EXPOSURE ANALYTICS

Footfall is not engagement.

THE MEASUREMENT PROBLEM

For two decades, the live events industry has measured how many people walked past a stand and called that performance.

Footfall is honest about what it is. It tells you who was there. It tells you when they were there. In a category where almost nothing else was measurable, footfall was the only number available, and as recently as five years ago that was a reasonable place to stop.

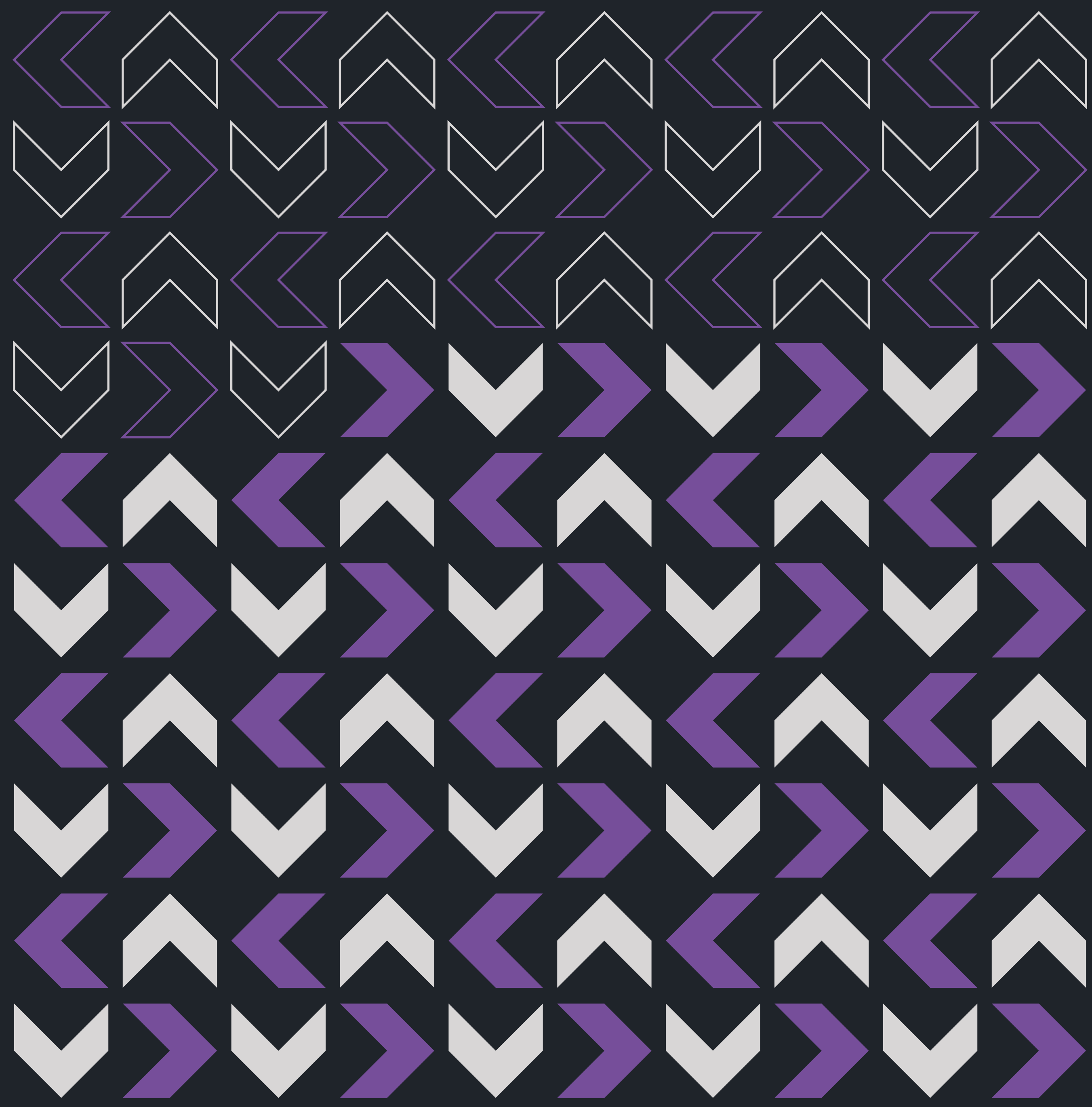
The reason it isn't reasonable anymore is commercial. The pressure to defend live event spend has changed inside organisations of every size. Marketing budgets are scrutinised against measurable return. Sales and product teams ask whether a trade show is a customer-acquisition engine or an expensive habit. Finance and procurement want comparable performance data across years and locations. Footfall does not answer any of those questions. Footfall tells you the room was full. It does not tell you what happened in the room.

This report is built on the dataset that does. Exposure Analytics has measured behaviour across more than 3,000 events and 43.8 million visitors since 2020, across eighteen sectors and eighteen countries, in exhibition halls, retail floors, activations and live brand spaces – collectively referred to as physical spaces throughout this report. The dataset records how many people were present, how many stopped, and how long they stayed. Each of those is a different question. Each of those is a different decision a business can take.

“Footfall tells you the room was full.
It does not tell you what happened in the room.”

The numbers behind this matter. Across the dataset, the average engaged visitor spends just over thirteen minutes inside a measured space. In an economy where most marketing attention is measured in seconds, thirteen minutes of focused physical engagement is a level of audience commitment few channels can match. That number is the opportunity hiding inside the problem.

The Physical Engagement Index is the first publication that turns that dataset into an industry benchmark. It establishes a global average for engagement in physical spaces. It identifies the performance gap between the strongest spaces and the weakest. And it makes the case that the live events industry already has the tools to measure itself behaviourally, and has been calling something else performance for too long.



67% of marketers report that attendance is one of the most important metrics to their business. (Source: Splash)

DEFINING PHYSICAL ENGAGEMENT INTELLIGENCE

Physical Engagement Intelligence is the discipline of reading human behaviour inside physical spaces; exhibition halls, retail floors, activations and live brand spaces.

Footfall counts presence. Digital analytics counts online interaction. Physical Engagement Intelligence does the work neither can do: it captures a richer behavioural picture of what happens when a real person enters a real space. How many stop, how many stay, where they move, what they pay attention to, what they ignore. Heatmaps. Journey patterns. Engagement depth. Attention duration.

This report focuses on three foundational signals from that picture. The signals any business measuring a physical space can act on first.

How many were present? ❯ **Volume**

How many stopped? ❯ **Engagement**

How long did they stay? ❯ **Dwell**

Each of those is a separate behavioural signal. Each can be measured. Each can be benchmarked against other spaces in the same sector, the same region, the same year. Taken together, they describe how a physical space actually performed, beyond the headline of how many people walked past.

It is the measurement layer that physical spaces have always lacked.

Present ❯ **Stopped** ❯ **Stayed** ❯ **Commercial Outcome**

[Footfall / Volume] — [Engagement] — [Dwell] — [Action / Value]

[Physical Engagement Intelligence]
The measurement layer between presence and outcome

Digital Analytics
Scrolled / Opened / Clicked

"It is the measurement layer that physical spaces have always lacked."

THIRTEEN MINUTES OF ATTENTION

Since 2020, over forty-three million people walked into measured physical spaces. Fifteen and a half million of them engaged. The average engaged visitor stayed for thirteen minutes and fifty seconds. That is the shape of attention at scale.

To put the dwell figure in context: most digital attention is measured in seconds. A typical online video ad earns single-digit seconds of view time. A typical mobile app session lasts a few minutes. Thirteen minutes of focused physical attention is an order of magnitude beyond what digital channels typically deliver.

These are the global benchmarks against which every space in this report sits. They are also a reminder of something the digital era has obscured: a physical space, when designed for behaviour, can hold human attention longer than almost any other commercial format in existence.

That is not a benchmark to file. It is a commercial opportunity hiding in plain sight. The channels marketing has spent the past decade obsessing over deliver a fraction of the attention a physical space already commands. The case for investing more deliberately in physical experience is, on the data alone, exceptional.

The four benchmark numbers

43.8 Million

Total measured visitors (2020 – April 2026)

15.6 Million

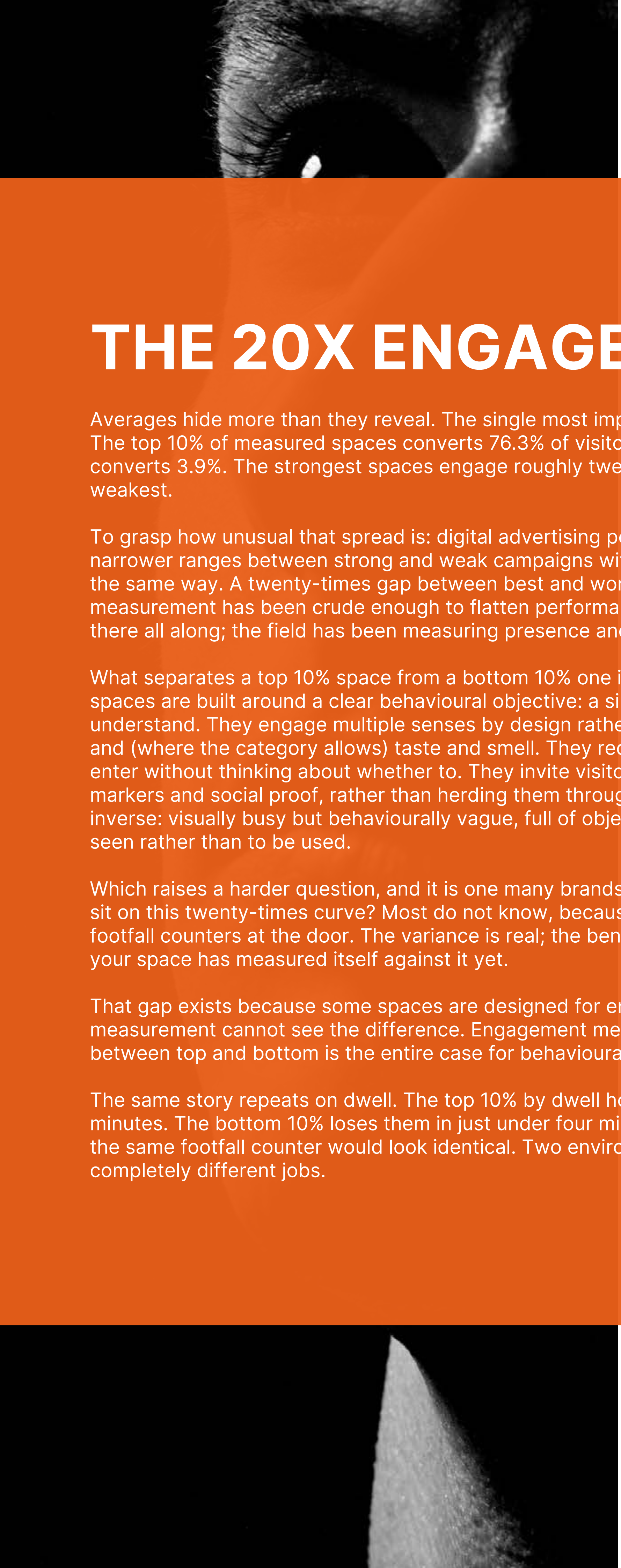
Total engaged measured visitors

35.59%

Average engagement rate

13:50

Average dwell time (minutes)



THE 20X ENGAGEMENT GAP

Averages hide more than they reveal. The single most important number in this report is the gap. The top 10% of measured spaces converts 76.3% of visitors into engagement. The bottom 10% converts 3.9%. The strongest spaces engage roughly twenty times more of their visitors than the weakest.

To grasp how unusual that spread is: digital advertising performance typically reports much narrower ranges between strong and weak campaigns within a category. Retail conversion behaves the same way. A twenty-times gap between best and worst is the signature of a category where measurement has been crude enough to flatten performance differences. The variation has been there all along; the field has been measuring presence and missing it.

What separates a top 10% space from a bottom 10% one is not budget. It is intent. The strongest spaces are built around a clear behavioural objective: a single thing a visitor should do, feel or understand. They engage multiple senses by design rather than by accident: sight, sound, touch, and (where the category allows) taste and smell. They reduce friction at the threshold, so visitors enter without thinking about whether to. They invite visitors to stay, with seats, content depth, time markers and social proof, rather than herding them through. The weakest spaces tend to be the inverse: visually busy but behaviourally vague, full of objects but empty of intent, designed to be seen rather than to be used.

Which raises a harder question, and it is one many brands cannot answer. Where does your space sit on this twenty-times curve? Most do not know, because most spaces are still measured by footfall counters at the door. The variance is real; the benchmark exists; the question is whether your space has measured itself against it yet.

That gap exists because some spaces are designed for engagement and others are not. Footfall measurement cannot see the difference. Engagement measurement cannot miss it. The gap between top and bottom is the entire case for behavioural benchmarking, in one number.

The same story repeats on dwell. The top 10% by dwell holds visitors for thirty-three and a half minutes. The bottom 10% loses them in just under four minutes. Two environments measured by the same footfall counter would look identical. Two environments measured by behaviour are doing completely different jobs.

"Where does your space sit on this 20x curve? Most do not know."

Cohort	Engagement Rate %	Dwell Time (mm:ss)	Total Visitors (Millions)
Top 10% by engagement	76.3%	17:08	2.2M
Bottom 10% by	3.9%	08:17	2.4M
Top 10% by dwell	45.3%	33:31	1.1M
Bottom 10% by dwell	33.4%	03:52	23.8M
Global average	35.59%	13:50	43.8M

THROUGH THE PANDEMIC AND OUT

The data measurement underneath this report crosses a pandemic, a recovery, and a re-baselining of how people behave in physical spaces. The year-by-year view covers five full years to 2025; the report's headline totals also include partial-year 2026 data, which is held out of the trend.

The dataset across 2020 and 2021 covers a more limited number of events, as the industry operated under pandemic restrictions. But the pattern it shows is instructive. Engagement in 2020 ran at 37.2% across an industry operating at a fraction of its normal scale. Spaces were emptier; the visitors who came were more committed. By 2021, engagement had fallen to 21.2% as visitor volumes recovered faster than visitor behaviour did. The next three years tell the recovery story: engagement climbed back to 33.6% in 2022, 34.2% in 2023, and 43.4% in 2024. By 2024, physical spaces were converting visitors at rates not seen since lockdown.

Step back from the year-by-year reading and a bigger pattern emerges. We are living through a period of unprecedented digital isolation. Algorithmic feeds, remote work, parasocial relationships and the steady erosion of unstructured public attention have combined to make sustained, in-person, focused human interaction one of the rarer commodities in modern commercial life. The physical event, almost by accident, has become one of the few formats that reliably delivers it. The human economy has been wildly underplayed during a decade of digital expansion. The data in this trajectory suggests it is overdue for a reappraisal.

2025 looks different against that backdrop. Engagement fell back to 30.3%, the lowest reading since 2021, even as measured visitor volumes stayed near their highest on record. Physical spaces are as full as ever, but visitors are engaging less. Read this way, the 2025 dip may have less to do with the events industry and more to do with the world the visitors are walking in from. People are arriving at physical spaces from increasingly fragmented digital attention diets, against a backdrop of geopolitical anxiety, economic pressure and information overload. An industry built on focused engagement is starting to feel that change in the data.

The challenge for the next benchmark cycle is whether physical spaces can adapt fast enough to hold attention that arrives more fractured than it used to. The next twelve months will tell us whether 2025 is the start of a pattern or a single data point.

Year	Visitors (Million)	Engagement Rate (%)	Dwell Time (mm:ss)
2020	1.2m	37.2%	15:52
2021	2m	21.2%	15:19
2022	2.3m	33.6%	13:08
2023	4.9m	34.2%	14:44
2024	16.1m	43.4%	15:52
2025	13.5m	30.3%	13:34

SIX REGIONS, SIX BEHAVIOURS

Engagement varies more by region than the industry assumes.

The global average is 35.59%, but behind that single number sit six regions, each with a distinct behavioural profile.

North America

39.0% engagement. 15:48 dwell. The highest engagement rate of any region in the dataset. That figure reflects a market with the longest unbroken history of professional B2B trade-show culture in the world, and visitors who reward well-designed spaces with their attention. North American spaces are not necessarily better designed than European ones; they are operating in a market that has had decades to learn what a high-performing physical space looks like, and a buying culture that takes physical experience seriously as a commercial channel.

Western Europe

36.4% engagement. 15:22 dwell. Visitors here stay comfortably longer than the global average. The pattern fits a culture that prizes considered consumption over rapid decision. European visitors spend longer in spaces because they expect spaces to be worth spending time in. The dwell-led model is the inverse of the throughput-led approach common in volume-heavy markets: depth over speed.

Middle East

26.6% engagement. 19:22 dwell. A pattern worth dwelling on. Lower conversion paired with the highest dwell of any region describes a visitor who is selective about which spaces deserve their attention but commits deeply to the ones that do. That is the behavioural signature of a market with strong hospitality conventions, longer purchase consideration cycles, and a cultural expectation of unhurried engagement. The dataset here is smaller than the major regions, and the figures should be read accordingly, but the pattern is consistent enough to be worth noting. The metric is the cultural pattern, made visible.

Asia Pacific

33.8% engagement. 12:56 dwell. Asia Pacific tracks close to the global mean across both measures. The headline hides considerable variation inside the region: Australian, Singaporean, Japanese and Chinese visitor behaviours are not interchangeable. What the regional average tells us is that physical engagement in APAC is broadly mature, broadly commercial, and operating within the global benchmark band.

Central and Eastern Europe

29.9% engagement. 15:27 dwell. The second-lowest engagement of the six regions, on the smallest measured sample in the dataset (88,000 visitors). The region reflects a market still building scale in physical engagement formats, rather than a behavioural deficit in the visitors themselves. The figures should be read with the sample size in mind, but the directional pattern is consistent with a market where physical engagement infrastructure is still developing relative to its Western counterpart.

UK and Ireland

35.4% engagement. 12:12 dwell. The dataset anchor: more than three-quarters of the measured visitors in this report come through UK and Ireland sensors. The behavioural pattern is volume-led rather than depth-led. UK visitors arrive often and engage at the global average rate, but leave faster than Western European or North American visitors do. That fits a market that has industrialised physical engagement at scale and operates under significant time pressure, with more events per capita than almost any other European country.

That UK weighting matters. Most of the statistical certainty in this report comes from the UK dataset; most of the comparative interest comes from the other regions. The two together describe a category that behaves differently across markets, and that needs benchmarking that respects the difference.

The regional picture shows that there is no single template for a high-performing space. Different regions, different cultures, different visitor expectations. The benchmarks adapt.

6 REGIONS,
6 BEHAVIOURS

Regional figures are based on the measured visitor volumes shown. Smaller-sample regions should be read as directional rather than statistically definitive benchmarks.

THE COUNTRY ATLAS

Eighteen countries sit in the dataset with sufficient measured volume to publish a benchmark, ranked here by engagement rate.

Three figures stand out. Each one says something about how its market thinks about physical experience.

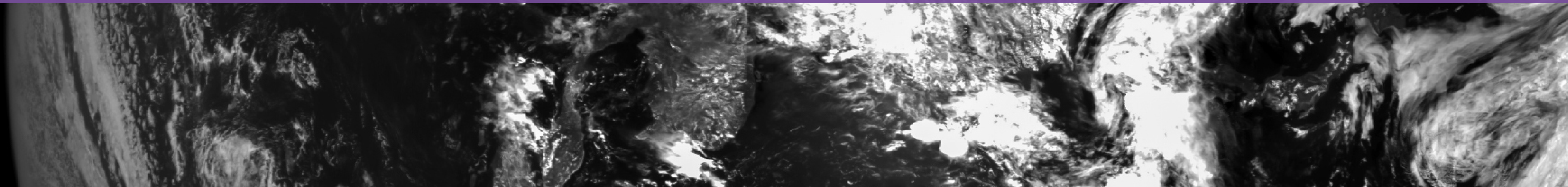
Germany leads on engagement at 48.9%, the highest rate among countries with more than one million measured visitors. That number aligns with a market built on industrial design culture, B2B trade-show maturity and premium-quality brand expectations. German visitors walk into spaces expecting precision and reward it with attention. If there is a single national benchmark worth studying for how a high-performing physical space looks, it is the German one.

China holds visitors among the longest at twenty-three minutes twenty-one seconds, one of the longest dwells of any country in the report. The pattern fits a market where physical commerce often sits at the centre of the customer relationship rather than the supplement to it, where premium brand spaces are treated as destinations in their own right, and where the cultural expectation of unhurried, considered engagement runs deeper than in Western markets. The dataset here is smaller than the major markets, and the figures should be read accordingly, but the pattern is consistent enough to be worth noting. The dwell figure is a useful counterweight to assumptions about Asian retail attention.

France sits at 25.4% engagement, among the lowest figures of any major Western European economy in the report and well below what its size and brand maturity would predict. The reasons behind that gap are not something the data alone can answer. What it does show clearly is that there is significant headroom. For sectors that already have premium brand presence in France, measuring what their physical investment is actually delivering behaviourally is the logical next step.

The country atlas

Country	Visitors, Millions	Engagement Rate %	Dwell time (mm:ss)
Germany	2.0M	48.9%	16:46
Portugal	89K	43.5%	14:55
Austria	277K	41.1%	15:48
Canada	689K	41.0%	16:20
Denmark	88K	38.4%	14:44
United States	1.6M	38.2%	15:44
Sweden	142K	37.0%	15:18
Switzerland	454K	36.0%	15:00
United Kingdom	33.2M	35.4%	12:12
Australia	628K	35.3%	12:08
Spain	1.8M	31.9%	13:35
United Arab Emirates	265K	31.4%	10:49
Italy	660K	31.3%	13:44
Netherlands	710K	25.8%	15:17
France	361K	25.4%	13:54
China	176K	25.3%	23:21
Belgium	145K	19.7%	14:41
Qatar	137K	13.8%	29:40



DIFFERENT ROOMS, DIFFERENT JOBS

Physical space is not a single category. The same word covers a trade show booth, a retail activation, an outdoor event and a flagship brand experience. The dataset shows how differently they behave.

Exhibitions hold visitors for seventeen minutes and convert nearly two in five into engagement. Retail floors hold them for twelve minutes at a 55% engagement rate. Activations engage 35% of visitors but for little more than half the dwell of an exhibition: nine minutes forty-six seconds.

The pattern maps onto what each space is asking visitors to do. Exhibitions invite considered exploration. Activations are designed for visibility and surprise. Retail, on a much smaller sample, converts the highest share of the three. In media-planning language, this is the difference between reach-oriented and engagement-oriented investment. What the data shows is that these are not interchangeable formats. An activation cannot do what an exhibition does for the simple reason that it is not designed to. A retail floor cannot deliver the engagement model of an activation because retail is not in the business of surprise.

Budget reality check. Most live-events budgets treat these formats as substitutable on a cost-per-visitor basis. The data says they are not. They are different products solving different commercial problems, and they need to be planned, briefed and measured accordingly. A buyer choosing between an exhibition slot and an activation moment is choosing between depth and reach. Treating that as the same decision is one of the most consistent commercial mistakes the live-events industry makes.

The indoor and outdoor split shows the same shape. Indoor spaces, where the space itself guides behaviour, convert 41% of visitors and hold them for sixteen minutes. Outdoor spaces convert 34% and hold them for eleven minutes. The lesson is simple. The more a physical space can guide, the more it can shape behaviour. Open-air activations work harder for the same level of engagement and need to be designed knowing that.

These numbers are the answer to one of the most common questions buyers ask: how good is my space? The honest answer is: compared to what kind of space?

Performance based on interaction type.

Interaction type	Visitors	Engagement Rate	Dwell time
Exhibitions	9.6M	39.7%	16:54
Activations	26.6M	34.8%	9:46
Retail	130K	54.8%	11:36

Performance based on setting type

Setting	Visitors	Engagement Rate	Dwell time
Indoor	10.7M	40.8%	16:19
Outdoor	33.0M	33.9%	11:00

“How good is my space? The honest answer is: compared to what kind of space?”

EVERY SECTOR, RANKED

Eighteen sectors. Each one behaves differently inside a physical space.

Education leads on engagement at 55%, a figure that maps onto the deliberate, considered nature of educational decision-making. Visitors walk into education spaces with an intention to learn, and the format rewards them.

Electronics (50.2%), finance (48.7%), retail activation (brands activating within physical retail environments) (50.6%), logistics (49.7%), medical (43.2%) and oil and gas (42.5%) all sit in the top tier. What unites them is visitor mission: people enter these spaces with a specific problem in mind. A spec comparison. An investment decision. A purchase consideration. A diagnostic interest. The visitor is already doing work; the space supports it.

For the top tier, the next move is rarely about engaging more visitors. It is about doing more with the engagement already on offer. The conversion of attention into commercial outcome is where the real performance gains come from once the engagement number is already strong. The discipline these sectors need most is to measure what happens after the engagement, not just whether it happens.

The middle tier (home tech, defence, manufacturing, automotive, pharmaceutical, FMCG, aerospace) clusters between 28% and 38%. These are sectors with mixed visitor missions and broader spaces designed to serve multiple audiences. Performance varies widely inside the category by space.

The opportunity for the middle tier sits in sharpening the visitor mission. Most middle-tier spaces are trying to do several jobs at once: brand expression, product demonstration, hospitality, lead capture. Defining the priority job each zone is doing, and designing each zone to do that job well, consistently moves performance toward the top tier.

The lower tier (technology, leisure, culture, sports lifestyle) sits below 30%. The story here is mixed. Some sectors, such as sports lifestyle, have visitor missions that lean toward browsing or socialising rather than focused engagement. Others, notably technology and culture, underperform against what the scale and prominence they typically bring to their physical presence would suggest.

The two halves of this tier need different answers. The browsing sectors need to decide which behavioural metric most honestly reflects what their physical spaces are designed to do. For some, dwell may be the more meaningful primary measure; how long visitors choose to stay is as valid a signal of success as how many stop to engage. The underperforming sectors need to redesign. Their physical spaces are working below their potential. Smaller, more focused formats often outperform the larger ones that try to do too many things.

The benchmarking question this data sets up is straightforward. Where does your sector sit relative to the global average of 35.59%? And where does your space sit relative to your sector?

Most readers will not be able to answer the second question. The first step toward an answer is choosing to measure.

Sector	Engagement Rate	Dwell Time (mm:ss)
Education	55.10%	15:04
Retail activation	50.61%	13:24
Electronics	50.17%	16:45
Logistics	49.72%	11:07
Finance	48.67%	12:08
Medical	43.17%	17:54
Oil and gas	42.53%	20:43
Defence	38.09%	12:23
Aerospace	37.33%	20:04
Home tech	37.16%	06:51
Automotive	36.76%	11:46
Manufacturing	35.60%	22:46
Pharmaceutical	33.99%	15:50
FMCG	28.81%	11:04
Technology	28.45%	14:34
Culture	22.92%	39:06
Leisure	22.36%	15:01
Sports lifestyle	18.66%	09:16

FOUR SECTORS UP CLOSE

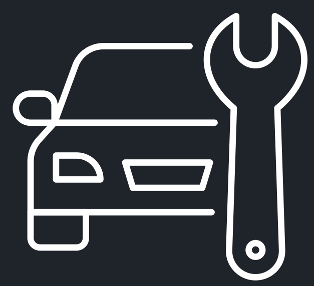
Four sectors warrant a closer look. Together they make up more than four-fifths of the measured dataset, and they tell four different stories about how a physical space can perform.

AUTOMOTIVE

13.7 million measured visitors. 36.8% engagement rate. 11:46 average dwell.

Automotive engages roughly a third of its visitors at the global average dwell. The sector's pattern is built around large trade-show stands at major automotive events, designed for considered viewing of new models, technology demos and brand storytelling. Engagement and dwell sit close to the industry baseline.

The opportunity for automotive is consistency. The strongest automotive spaces guide visitors through deliberate journeys rather than letting them drift, with pause points engineered around the moments that change a buyer's mind. Zone-by-zone measurement turns the difference between a nine-minute visit and an eleven-minute visit into something a team can act on at the next event rather than the next year.



HOME TECH

18.4 million measured visitors. 37.2% engagement rate. 6:51 average dwell.

Home tech runs the opposite pattern. It engages 37.2% of its visitors, a little above the average, but holds them for just six minutes and fifty-one seconds. The shortest dwell of any major sector.

Home tech physical spaces are engineered like retail: high turnover, fast interactions, designed for impression and capture. That model works. The question the data raises is whether it works as well on premium products, where a few extra minutes of dwell would change the conversion picture entirely.

The strongest home tech spaces deliberately slow visitors down on premium zones — guided routes, pause moments, tactile and experiential elements that reward staying. The category already knows how to catch attention. Whether it knows how to hold it is the conversation home tech has not yet had with itself.

PHARMACEUTICAL

1.6 million measured visitors. 34.0% engagement rate. 15:50 average dwell.

Pharmaceutical is the inverse pattern. Engagement runs at the global average, but dwell stretches to almost sixteen minutes.

Healthcare professionals do not browse. The 15:50 dwell figure reflects an audience that has come to a space ready to absorb complex content, and a space designed to deliver it. This is the highest-value engagement model in the dataset for sectors that need education and trust before purchase.

For pharma, the opportunity is defence rather than transformation. The team already understands what physical events deliver; the next move is making sure that understanding lives in the numbers as well as in the experience. Engagement and dwell measured on every booth visit, captured by sector and seniority, build a commercial case strong enough to defend when the next budget cycle puts physical-event spend under review.

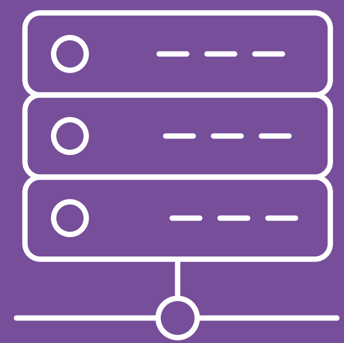
TECHNOLOGY

3.6 million measured visitors. 28.5% engagement rate. 14:34 average dwell.

Technology is the surprise of the deep-dive group. With an engagement rate of 28.5%, the sector underperforms the global benchmark and most of its commercial peers, despite the scale and prominence that technology brands typically bring to their physical presence.

The data suggests that visibility has been prioritised over interaction. The opportunity here is significant. The sector already commands budget and footprint. What it is missing is the conversion of presence into focused engagement, which is precisely the gap that behavioural measurement was built to close.

The shift technology needs is from visibility to visitor mission. Every zone of the physical space needs a defined job. Fewer demos per stand, with more time spent on each. Routes that slow visitors down rather than letting them sweep through. Engagement and dwell read as primary KPIs alongside leads captured. Done together, those moves turn a prominent physical space into a high-performing one.



THE CALENDAR OF ATTENTION

Engagement is not flat across the year. The data shows a clear seasonal shape, useful for anyone planning when to invest in a live physical space.

The strongest month is August at 47.3%, followed by October at 44.0%, November at 39.1%, February at 37.8% and May at 37.2%. October also holds the highest dwell of any month: sixteen minutes and ten seconds. What these months share is visitor intent. October is when both consumer and B2B audiences are in active planning mode for the year ahead, and when annual budgets are still flexible enough to act on what attention reveals. August reads as the seasonal anomaly. Traditionally a low-volume month for live events due to summer holidays across UK and European markets, the visitors who are present in August are an unusually self-selecting audience — people who have actively chosen to attend when most of their peers are away. That intentionality shows in the engagement rate. April and May are the spring uplift, when planning conversations restart after the slow winter.

The weakest months on engagement are December (31.4%) and September (31.0%). Both sit below the global average. December is the festive-season distraction effect: visitors are present, but their attention is elsewhere. September is more interesting. Audiences are returning from the summer break and re-engaging, and the data shows they need a moment to refocus before they commit.

A different pattern lives in the dwell numbers. October's 16:10 dwell is about three and a half minutes longer than December's 12:43. Visitors are not just engaging more in October; when they engage, they engage deeper. The October investment compounds: higher conversion and longer dwell, both at the same time.

The opportunity inside this pattern is practical, and it has consequences for how budgets are allocated. The same activation in October versus December can shift engagement by roughly twelve percentage points and dwell by three and a half minutes. Most event budgets are signed off with reference to availability, cost and audience scale; almost none reference seasonal engagement performance. That is a meaningful gap between how decisions are taken and how performance is delivered.

Sector implication. For B2B sectors with long planning cycles (trade shows, corporate events, premium product launches) October remains the strategic peak. For consumer sectors that need late-stage purchase intent (FMCG, retail, leisure) April through June and August offer better conditions than the December cluster. The pattern repeats year-on-year reliably enough to plan against.

"The same activation in October versus December can shift engagement by roughly twelve percentage points and dwell by three and a half minutes."

Month	Engagement Rate %	Dwell time (mm:ss)
January	35.4%	12:30
February	37.8%	13:35
March	33.0%	14:49
April	36.5%	15:08
May	37.2%	14:27
June	32.8%	12:58
July	31.6%	11:14
August	47.3%	11:01
September	31.0%	14:15
October	44.0%	16:10
November	39.1%	14:00
December	31.4%	12:43

WHEN SIZE ISN'T EVERYTHING

Contributed by Joost Bijsterveld Founder & Director Strategic Marketing, 6Foot4. Formerly Director of Global Experiential Marketing at Philips

Let me say something unpopular about the exhibition industry.

For two decades, the most expensive conversation in live events has been about square metres. Bigger stands, bigger budgets, bigger statements. Boards approve big footprints because the visible commitment justifies the spend. Exhibition contractors price the trade by the square metre because that is how the industry has always sold itself. Brand teams compete for floor plans before they have decided what their booth should actually do.

It is, with respect, all backwards.

The Index data behind this report makes the point cleanly. Some of the highest engagement rates measured across more than forty-three million visitors come from smaller and mid-sized spaces. The largest booths attract enormous traffic, and some convert it exceptionally well, but they are the exception rather than the rule. High dwell times appear at every booth size in the dataset, not only the largest. What the strongest large booths share is not their size but their intent. Size, on its own, is empty.

So why does the industry persist? Two reasons, both structural, neither inspiring.

The first is the economics. Exhibition floor space is sold by the square metre, which means size is the simplest proxy the trade has for spend. Brand teams who have just signed a six-figure contract for floor space find it psychologically easier to defend the decision when the metres are big. Spend becomes its own justification.

The second is anchor psychology. Big booths are an internal signal more than an external one. CEOs and boards see the size of the footprint as proof that the brand is serious about the show. The customer-facing engagement happens, or fails to happen, somewhere downstream of the meeting where the size was approved. Most exhibition planning is a confidence display aimed at the people writing the cheque, not the people walking the floor.

I would back the data over either of those instincts.

What the strongest-performing stands share, almost without exception, is intent. A clear behavioural objective. A single thing a visitor should do, feel or understand. Senses engaged by design rather than by accident. Intent is what drives engagement and dwell time, and when you get that right, size stops mattering altogether. Size becomes a multiplier when those things are in place, and a liability when they are not.

A clear objective shapes what a visitor does once they're on a stand. Getting them over the threshold in the first place is a different problem, and there are only two reliable ways to solve it: clever, well-considered design, or very strong human engagement. One of the two has to do the work of the invitation. A stand that relies on neither is simply hoping.

Premium retail figured this out two decades ago. Small, considered, sensorial spaces; boutiques, Apple Stores, Aesop shops, consistently outperform larger formats on engagement and conversion. The flagship boutique model has been the dominant force in premium retail design for a generation. Exhibitions are running about twenty years behind that learning curve.

The reframe is straightforward, and stop me if you have heard this one before. Stop asking how many people walked past the booth. Start asking what people actually did when they arrived. Stop briefing the contractor in square metres. Start briefing them in visitor outcomes. Stop measuring exhibition spend by exposure, which most of the industry already does, and start measuring it by what the exposure produced, which almost none of it does.

The data in this report makes the case in numbers. The argument has been making itself for years.

"Most exhibition planning is a confidence display aimed at the people writing the cheque, not the people walking the floor."

THE RIGHT POSITION

Contributed by Patrick Fagan, Chief Scientific Officer, Capuchin Behavioural Science.

The M25 gets a lot of traffic, but you probably wouldn't hold a business meeting there. Front-and-centre is the exhibition industry's version of the same mistake, dressed up as common sense: exhibitors compete for it and pay premiums for it on the assumption that visibility converts directly into engagement. The data behind this report says otherwise, and says it fairly loudly.

Front-and-centre and middle positions dominate visitor traffic in this dataset. They do not dominate engagement. Front-left and front-right positions outperform both on conversion rate and dwell time; back positions, the industry's consolation prize, generate stronger engagement depth than the supposedly prime central real estate. The middle of a hall is, behaviourally, a flow-through zone rather than a pause zone.

Salience does matter, so this isn't an argument against being seen; people are cognitive misers who notice what is easy to notice. But the trouble starts when that sensible point gets inflated into a golden rule: more passing traffic must mean more engagement. It doesn't. The M25 carries an enormous number of people, and it would still be a terrible place to hold a sales meeting.

An exhibition visitor in the busiest aisle is not in a receptive state: laden with tote bags, running late for a talk, half-watching a buzzing phone. Perceptual load theory puts the point formally — the more attention one task consumes, the less remains for anything else. A central position maximises the number of retinas exposed to a stand while creating terrible conditions for receiving any thought from it.

Retail crowding research finds the same pattern: too many people nearby reduces a person's sense of control, and people respond by leaving sooner, browsing less carefully, and avoiding difficult decisions. A crowd is fun at a football match; it's less useful when somebody needs the confidence to admit they don't understand what you sell. A complicated proposition is not a penalty kick, settled in a few seconds — people need to ask questions and feel in charge of what's going on.

That is why a quieter, one-to-one conversation does more work than the footfall numbers suggest. The salesperson can see confusion forming and adapt; the visitor has to participate mentally rather than absorb a broadcast. That dynamic collapses next to a spin-the-wheel activation with forty strangers brushing past.

There is a social cost to the busy aisle too. Approaching a stand is a public act — stopping announces interest, and risks a stupid question or an awkward exit performed with excessive politeness. The more exposed the interaction, the greater that risk feels. The moving crowd compounds it: people use social proof because copying is faster than working things out from scratch, so every passer-by who ignores a stand casts a small vote for ignoring it, and the crowd teaches everyone else to keep moving too.

So why does the industry keep paying a premium for a position that does all of this to a prospect? Two reasons, neither strategic. The first is inertia: the trade has always charged more for high-traffic positions, so the pricing followed the assumption before anyone tested it. The second is internal optics — a front-and-centre stand reads as success to a CEO or board, even though the visitor is, somewhat counter-intuitively, more likely to engage once they have taken three steps off the main aisle to reach you.

Front-and-centre creates high exposure. It also creates overload, reduced control, public self-consciousness, and a crowd instructing everyone to keep moving. Quieter positions trade some of that exposure for meaningful interaction — a trade most exhibitors would take if anyone framed it as a trade rather than a downgrade. Prime position should be redefined by the conditions it creates — openness, pause points, sight lines, room to ask a question without an audience — not the traffic it attracts.

Prime position exists. The industry has just been calling the wrong thing prime for too long.

"Prime position exists. The industry has just been calling the wrong thing prime for too long."

HOW PERFORMANCE CHANGES ACROSS LOCATION

Back

Visitors: 195k
Engagement rate: 41.4%
Dwell Time: 14:28

Middle

Visitors: 19.6m
Engagement rate: 35.1%
Dwell Time: 16:51

	Front Left	Front Centre	Front Right
Visitors:	109k	12.2m	129k
Engagement rate:	49.9%	41.6%	45.0%
Dwell Time:	16:51	12:02	16:31

THE NEW BENCHMARK FOR LIVE SPACES

This report is the first edition of the Physical Engagement Index. It establishes a global benchmark for behaviour in physical spaces, drawn from more than 3,000 events and over forty-three million measured visitors since 2020, across eighteen countries and eighteen sectors. It is also, deliberately, an argument: that the live-events industry already has the tools to measure itself behaviourally and has been calling something else performance for too long.

That argument is now made. What comes next is the work.

For brands and the buyers inside them, the practical move is simple. Stop accepting footfall as proof of performance. Ask for engagement and dwell measurement on every physical space, every live event, every activation. Use this report's benchmarks to decide whether your space sits in the top 10%, the middle, or the bottom 10%. Then ask why. The answer is rarely about budget. It is about how the space is designed to work.

For agencies and contractors, the move is to take behavioural measurement seriously as a planning and pitching tool. Briefs that include behavioural KPIs from the start consistently produce better-performing physical spaces than briefs that leave measurement to the end. Engagement and dwell should sit in the same paragraph of a brief as visitor numbers and visual treatment.

For the events industry as a whole, the move is structural. The pricing model, the procurement language, the way boards approve event spend; all of these were built around footfall as the dominant measure. Replacing footfall with behavioural performance changes more than a metric. It changes the basis on which decisions get made.

The Physical Engagement Index will publish annually. Each edition will deepen the dataset, sharpen the benchmarks, and add new dimensions where the data supports them. The first edition makes the case. The next will measure how much the industry has heard it.

THE PHYSICAL ENGAGEMENT REFRAME

Measure

OLD THINKING:
Footfall

NEW THINKING:
Engagement rate, dwell, depth

Report

OLD THINKING:
How many visited

NEW THINKING:
How they behaved

Optimise

OLD THINKING:
Visibility

NEW THINKING:
Interaction conditions

Compare

OLD THINKING:
Against last year

NEW THINKING:
Against the industry benchmark

"Replacing footfall with behavioural performance changes more than a metric. It changes the basis on which decisions get made."

ABOUT EXPOSURE ANALYTICS

Exposure Analytics is the measurement business behind the Physical Engagement Index. We work with brands, agencies, event organisers and venue operators to measure how real people behave in physical spaces: how many stop, how many stay, how long they engage, where they go and what they pay attention to. The sensors are quiet. The data is honest. The reports turn footfall counts into behavioural intelligence.

The Physical Engagement Index is the annual public reflection of what we are seeing across the category. The data behind it comes from more than 3,000 events and over forty-three million measured visitors since 2020, across eighteen countries and eighteen sectors. It is the largest behavioural dataset of its kind for physical spaces, and it will deepen with every edition.

We would like to extend a heartfelt thanks to Joost Bijsterveld from www.6foot4.com and Patrick Fagan from https://capuchin.cc/ for their contributing articles to the report.

METHODOLOGY

The Index draws on Exposure Analytics' deployed sensor network across exhibition halls, retail floors, activations and live brand spaces. Each measured deployment records total visitor count, engaged visitor count (visitors who interacted with the space rather than passing through), and dwell time among the engaged subset. Engagement is defined by a visitor remaining within a specified distance of the sensor for a minimum period of time, with both parameters determined by the client.

Records flagged as test deployments, calibration runs, internal R&D or duplicates were excluded from the benchmark. The dataset published here covers 2020 - April 2026, with 2026 representing partial-year data. Country, sector and interaction-type benchmarks are reported only where measured volume meets the threshold required for confidence; smaller markets are aggregated into regional totals.

THE NEW BENCHMARK FOR LIVE SPACES

The dataset for 2020 and 2021 reflects a period of significant industry disruption. The number of measured events across those two years was substantially lower than in subsequent years, as pandemic restrictions limited the volume of live events taking place. The engagement and dwell figures reported for those years should be read in that context: they are drawn from a smaller sample of events, and the visitors present were to a greater degree self-selecting. The trend data from 2022 onwards, where measured event volumes return to scale, carries greater statistical weight and is the firmer basis for the benchmarks published in this Index.

Sample composition of dataset.

Sample dimension	Detail
Total measured visitors	43.8 million
Years Covered	2020-2026 (five full years plus 2026 partial)
Countries with publishable benchmarks	Eighteen (those with 50,000+ measured visitors)
Sectors reported	Eighteen (smaller and non-comparable sectors excluded)
Interaction types Settings	Three (exhibition, activation, retail) Indoor and outdoor

Definition of spaces measured:

Event: A broader organised occasion (e.g. a music or car festival, flower show, conference, customer-only day, launch, or hospitality event).

Exhibition: A trade/industry environment where organisations exhibit to an audience (e.g. a trade show or congress).

Activation: A specific branded experience designed to generate interaction, which may sit inside an event or exhibition.

Retail: An ongoing physical commercial environment primarily designed around shopping/purchasing.

EXPOSURE ANALYTICS

Exposure Analytics.
The measure of physical engagement.

The Physical Engagement index is an annual report and is next due to be published in 2027.

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